

Morningstar® UK Adviser Events

| Adviser Forums Calendar | Date | Year | Location | Date | Year | Location | Registration |
|-------------------------|-------------|------|---|--------------|------|------------|---|
| | 7 February | 2012 | Chelmsford | 30 May | 2012 | London | Click Here to register for an Adviser Forum |
| | 23 February | 2012 | Cardiff | 13 June | 2012 | Newcastle | |
| | 7 March | 2012 | London | 4 July | 2012 | Maidstone | See below to view full agendas. |
| | 15 March | 2012 | Glasgow | 12 September | 2012 | Edinburgh | |
| | 15 March | 2012 | Edinburgh | 18 October | 2012 | London | |
| | 21 March | 2012 | Exeter | 7 November | 2012 | Bristol | |
| | 28 March | 2012 | Cheltenham | 21 November | 2012 | Manchester | |
| | 19 April | 2012 | Belfast | 5 December | 2012 | Birmingham | |
| | 25 April | 2012 | Leeds | | | | |
| | 15-16 May | 2012 | Morningstar Investment Conference, London | | | | |

Morningstar Adviser Forum Roadshows

With the RDR deadline fast approaching, the Morningstar Adviser Forums are an excellent resource for supporting your Gap Fill needs and providing you with practical information on ways to improve your business, by using Morningstar products and services.

Reasons you should attend:

- ▶ Attendance is free of charge and includes refreshments and lunch
- ▶ Collect between 3.5 and 5.0 CPD points and gap fill credits: Accredited by the IFP, PFS and soon by the IFS.
- ▶ Network with your peers

- ▶ Hear from Morningstar and other industry experts
- ▶ Learn how to have an independent and efficient investment process

In 2012, Morningstar experts will present on Analyst Fund Research, Closed-end Funds, Client Communications, Behavioural Finance and Regulation.

And our guest speakers include representatives from the AIC, IFA Life, The Platform and Technical Connections.

Please join us at a Morningstar Adviser Forum near you.

Delegate Testimonials

“This was the first event I have taken the opportunity to attend, overall I found it very interesting and valuable. I found the advisor work station especially interesting and have fed back further to senior managers in respect of how useful a tool this could be to our advisors. Thank you.”

– Davina Short, HSBC

“Presentations on technical subjects are first class and have provided new ideas and informed on new tools for solving clients problems.”

– David Holland, Global IFA Ltd

Morningstar Investment Conference

Interact with prominent financial experts, connect with peers and discover innovative strategies from leaders in their field.

Learn more at the conference [website](#) or [register here](#).

Morningstar® UK Adviser Events

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| Morningstar Adviser Forum Schedule | 7 February 2012 Chelmsford | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Products Manager, Morningstar</i> ▶ How Investment Companies Can Benefit Your Clients Portfolios – <i>Annabel Brodie-smith, Director of Communications, The Association of Investment Companies</i> ▶ New Global Fund Report – <i>Dan Lefkowitz, European Fund Research, Morningstar</i> ▶ Closed-End Fund Gap Fill Session – <i>Jackie Beard, Director of Closed-end Fund Research, Morningstar</i> |
| | 23 February 2012 Cardiff (Breakfast Briefing) | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Products Manager, Morningstar</i> ▶ New Global Fund Report – <i>Dan Lefkowitz, European Fund Research, Morningstar</i> |
| | 7 March 2012 London | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Caroline Gutman, Client Solutions Consultant, Morningstar</i> ▶ How To Be Independent – <i>Gillian Cardy, Managing Director, IFA Centre</i> ▶ New Global Fund Report – <i>Dan Lefkowitz, European Fund Research, Morningstar</i> ▶ Social Media: Time Wasting Fad or the Holy Grail of Communication Tools for IFAs and Financial Planners in a Post RDR World – <i>Philip Calvert, Founder, IFA Life</i> |
| | 15 March 2012 Edinburgh (Afternoon Briefing) | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Phoebe Elia, Adviser Sales Executive, Morningstar</i> ▶ Online Client Communications – <i>Catherine McEwing, Head of Individual Software, Morningstar</i> |
| | 15 March 2012 Glasgow (Breakfast Briefing) | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Phoebe Elia, Adviser Sales Executive, Morningstar</i> ▶ Closed-End Fund Gap Fill Session – <i>Jackie Beard, Director of Closed-end Fund Research, Morningstar</i> |
| | 21 March 2012 Exeter | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Caroline Gutman, Client Solutions Consultant, Morningstar</i> ▶ OBSR Analyst Insight – <i>Richard Whitehall, Investment Research Analyst, OBSR, a Morningstar Company</i> ▶ New Global Fund Report – <i>Dan Lefkowitz, European Fund Research, Morningstar</i> ▶ Asset Allocation for the 20th Century – <i>Paul Kaplan, European Quantitative Research Director, Morningstar</i> |
| | 28 March 2012 Cheltenham (Breakfast Briefing) | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Tarik Alalami, Adviser Sales Manager, Morningstar</i> ▶ Closed-end Funds – <i>Jackie Beard, Director of Closed-end Fund Research, Morningstar</i> |

Morningstar® UK Adviser Events

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| Morningstar Adviser Forum Schedule Cont. | 19 April 2012 Belfast (Breakfast Briefing) | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Paul Mifsud, Adviser Sales Executive, Morningstar</i> ▶ Asset Allocation for the 20th Century – <i>Paul Kaplan, European Quantitative Research Director, Morningstar</i> |
| | 25 April 2012 Leeds | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Caroline Gutman, Client Solutions Consultant, Morningstar</i> ▶ New Global Fund Report – <i>Dan Lefkowitz, European Fund Research, Morningstar</i> ▶ Platforms: An Insight into the Current Market – <i>Emma Napier, Head of Adviser Relations, The Platform</i> ▶ Investing with ETFs – <i>Hortense Bioy, Senior ETF Analyst, Morningstar</i> |
| | 30 May 2012 London | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Products Manager, Morningstar</i> ▶ Analyst Panel – <i>Peter Toogood, Hortense Bioy, Jackie Beard</i> Social Media: Time Wasting Fad or the Holy Grail of Communication Tools for IFAs and ▶ Financial Planners in a Post RDR World – <i>Philip Calvert, Founder, IFA Life</i> ▶ How Investment Companies Can Benefit Your Clients Portfolios – <i>Ian Sayers, Director General, The Association of Investment Companies</i> |
| | 13 June 2012 Newcastle | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Products Manager, Morningstar</i> ▶ OBSR Analyst Insight – <i>Richard Whitehall, Investment Research Analyst, OBSR, a Morningstar Company</i> ▶ How Investment Companies Can Benefit Your Clients Portfolios – <i>Ian Sayers, Director General, The Association of Investment Companies</i> ▶ Understanding Pensions' Law – <i>Paul Clark Pensions Consultant, Technical Connections</i> |
| | 4 July 2012 Maidstone | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Tarik Alalami, Adviser Sales Manager, Morningstar</i> ▶ How to Create a Profitable Business – <i>Rob Stevenson, Director, Kingmakers Group</i> ▶ Closed-end Funds – <i>Jackie Beard, Director of Closed-end Fund Research, Morningstar</i> ▶ UCITS + MIFID2 – <i>Andy Pettit, Director of Data and Research Strategy, Morningstar</i> |
| | 12 September 2012 Edinburgh | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Caroline Gutman, Client Solutions Consultant</i> ▶ OBSR Analyst Insight – <i>Chetan Modi, Fund Analyst, OBSR, a Morningstar Company</i> ▶ Closed-end Funds – <i>Szymon Idzikowski, Closed End Funds Analyst</i> ▶ Understanding Pensions' Law – <i>Paul Clark Pensions Consultant, Technical Connections</i> |

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| Morningstar Adviser Forum Schedule Cont. | 18 October 2012 London | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Sales Manager</i> ▶ Closed-end Funds – <i>Szymon Idzikowski, Closed End Funds Analyst</i> ▶ Platforms: An Insight into the Current Market – <i>Emma Napier, Head of Adviser Relations, The Platform</i> ▶ Online Client Communications – <i>Catherine McEwing, Head of Individual Software</i> |
| | 7 November 2012 Bristol | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Tarik Alalami, Adviser Sales Manager</i> ▶ Investing with ETFs – <i>Hortense Bioy, Senior ETF Analyst, Morningstar</i> ▶ Closed-end Funds – <i>Jackie Beard, Director of Closed-end Fund Research, Morningstar</i> ▶ OBSR Analyst Insight – <i>Emma O'Neill Investment Research Analyst, OBSR, a Morningstar Company</i> |
| | 21 November 2012 Manchester | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Caroline Gutman, Client Solutions Consultant</i> ▶ OBSR Analyst Insight – <i>Chetan Modi, Fund Analyst, OBSR, a Morningstar Company</i> ▶ How Investment Companies Can Benefit Your Clients Portfolios – <i>Annabel Brodie-smith, Director of Communications, The Association of Investment Companies</i> ▶ Online Client Communications – <i>Catherine McEwing, Head of Individual Software</i> |
| | 5 December 2012 Birmingham | <ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Anastasia Georgiou, Adviser Products Manager</i> ▶ TBC – <i>Mark Loosmore, Business Development Director, IRESS Wealth Management</i> ▶ Platforms: An Insight into the Current Market – <i>Emma Napier, Head of Adviser Relations, The Platform</i> ▶ Investing with ETFs – <i>Hortense Bioy, Senior ETF Analyst, Morningstar</i> |

Please [click here](#) to register your place at any of these forums, or for further information, email contact us evenstmanager@morningstar.com.